CTP, Planview Portfolios – How to Create a New Portfolio

Purpose

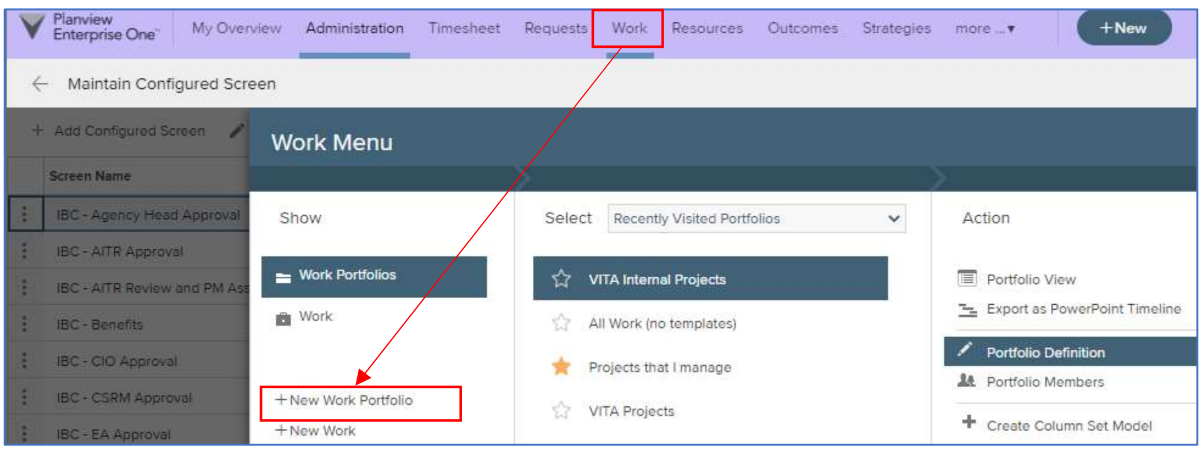
Portfolios are built to allow users to see a group of data, based upon attributes selected when defining the portfolio. Portfolios are supported by these entities/menu options: *Requests, Work, Strategies, Planning, Resources and Outcomes*. **Note**: Menu items visible to each user depends upon their configuration in the Commonwealth Technology Portfolio (CTP). This document provides a guide for creating a **Work Portfolio**, but the same directions can be used for creating a portfolio for any of the other entities.

Responsibility/Ability

The ability to create portfolios depends upon the user configuration within the CTP.

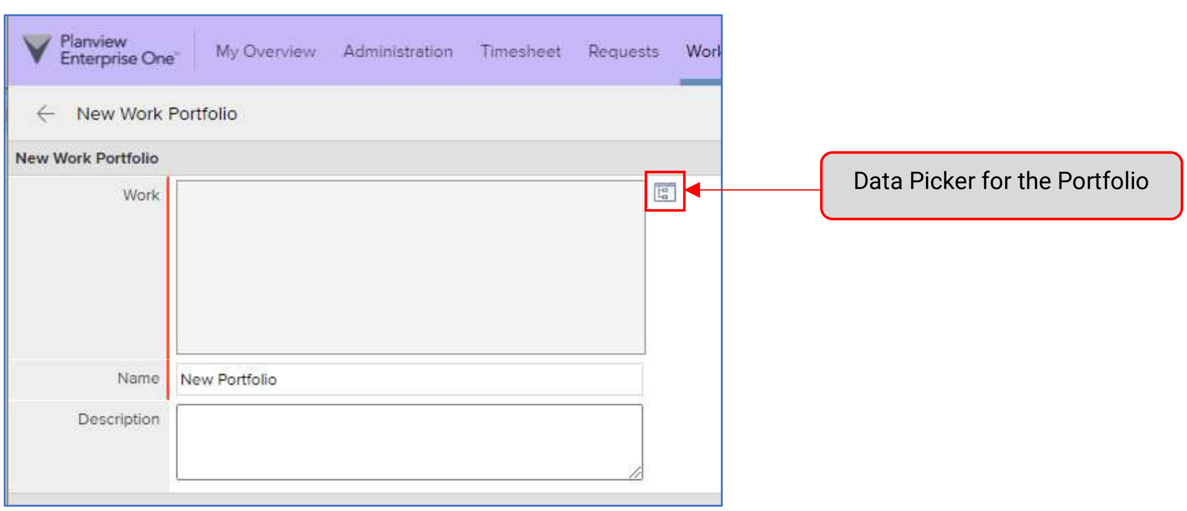
Building a basic Work Portfolio

1. From the Planview Portfolios Menu, select **Work**, then select **+New Work Portfolio** from the left column of the **Work Menu**, under **Show**:



Note: If you do not see +New Work Portfolios, you are not configured to be able to create new portfolios.

2. Click on the small **Data Picker** to the right of the larger **Work** box:



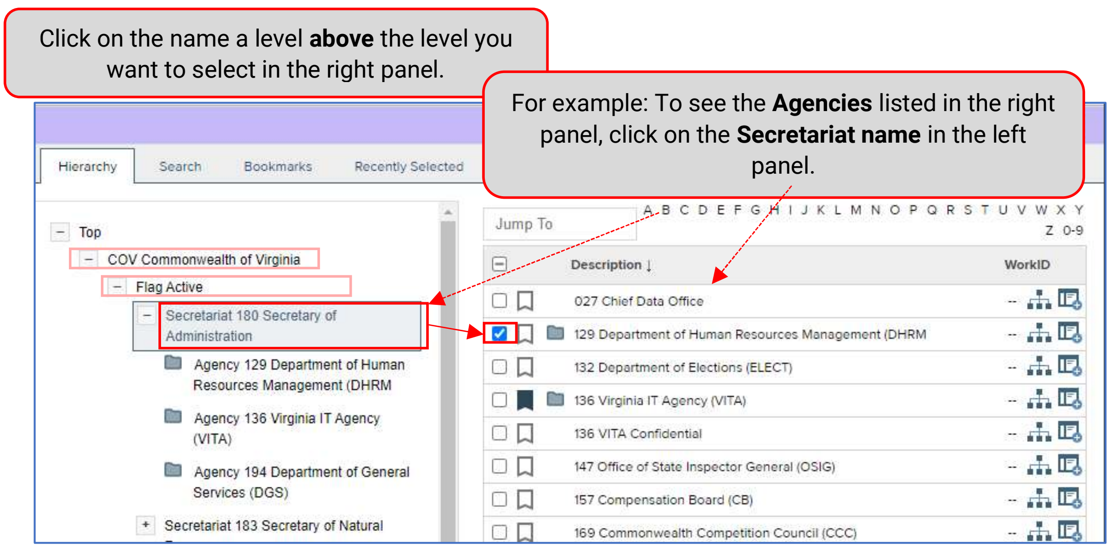
3. This brings up a hierarchical view of the **Work** structure (or structure for the entity/menu option selected). The Work structure is where all projects and procurements are stored. (What you see here depends on the grants configured for you for the entity, in this case, Work grants.)

   Note: The levels you see will depend on how you are configured in Planview.

   a. On the left panel, drill down to the level of the structure that you want to see. You will want to select one level *higher* on the left panel, than you want to select on the right.

   b. On the right panel, place a check in the box by the group(s) you want to see in your portfolio

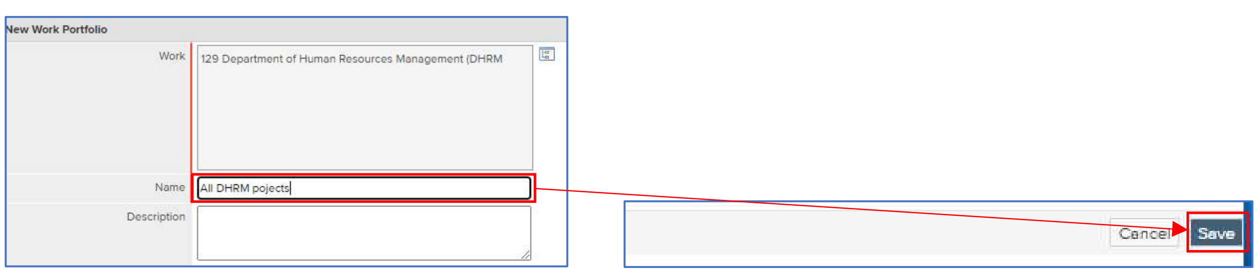
      - For example, if you want the portfolio you are building to show all **Work** that resides under Agency **129 Department of Human Resources**, you will select **Secretariat 180 Secretary of Administration** in the left panel (you will have to click on the *name* to select it), put *check* by **129 Department of Human Resources** in the right panel**.**



   Note: If you drill down too far in the left panel, you will see the **project names** in the right panel. You can select projects for your portfolio, but when a new project is added, it will not be visible in your portfolio unless you go back and add it. It is best to pick at a higher level. Then, when new projects are added, they will automatically be added to your portfolio.

4. Give your portfolio a **Name** that reflects what you will be seeing in the portfolio:

5. Click on **Save** (bottom right of the screen)

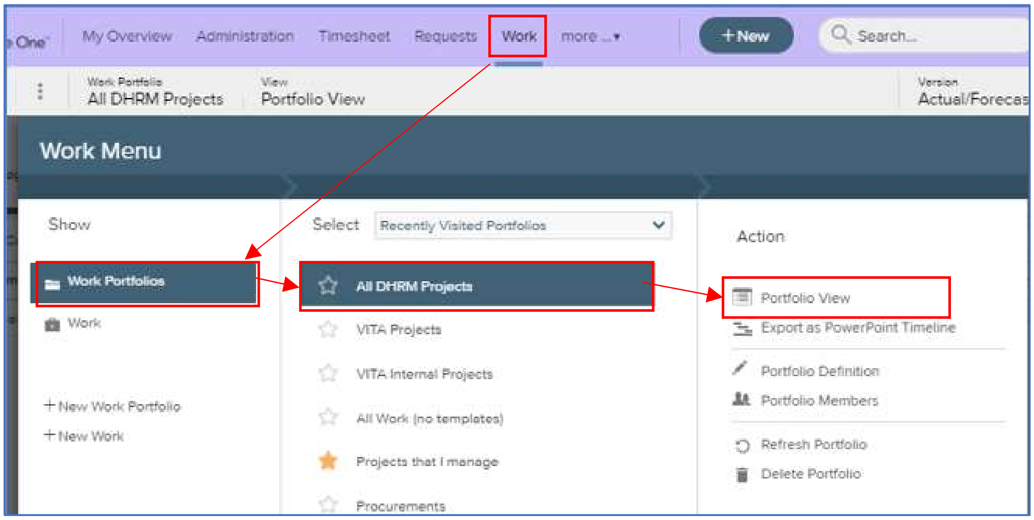


6. Your Work Portfolio is now available from your **Work Menu** and can be viewed by selecting:

   a. From the menu: **Work**

   b. From the **Work Menu**:

- Under **Show** (far left column), select **Work Portfolios**
- Select the desired portfolio name in the center section
- Under **Action** (far right column), select **Portfolio View**

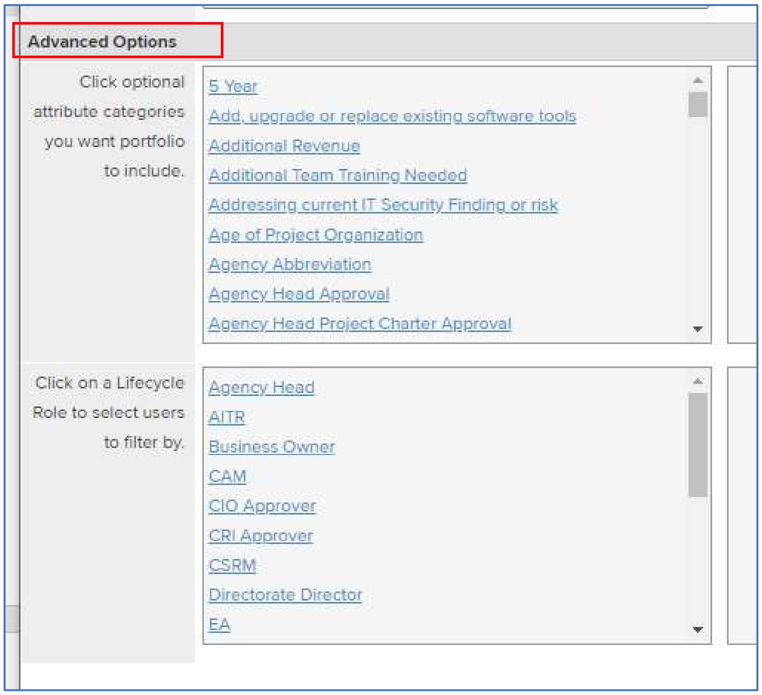


Other actions you may see on a Portfolio menu:

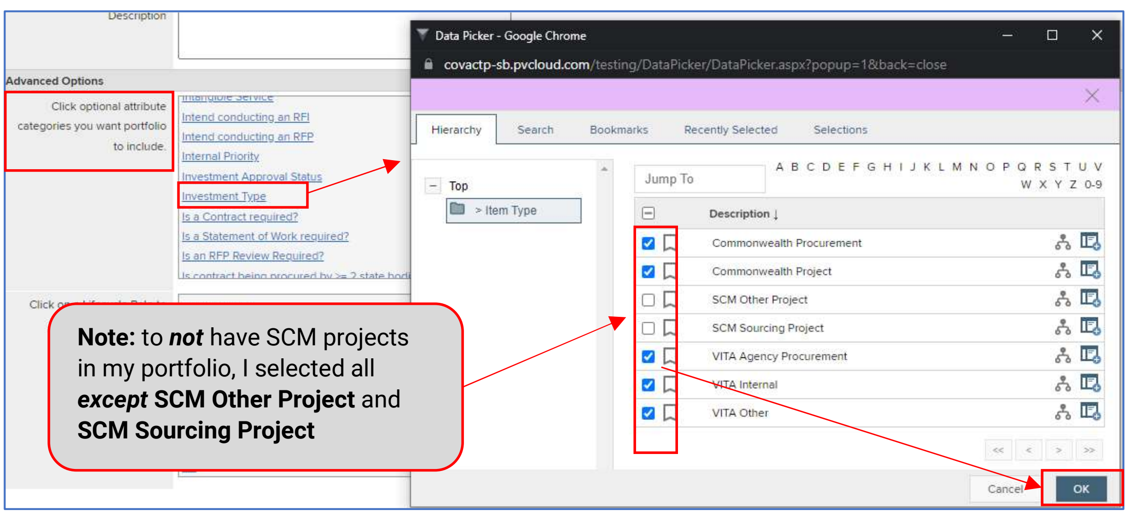
- **Export as PowerPoint Timeline**: Not yet covered in your training, but to read more about this, see Planview's Customer Success Center.
- **Portfolio Definition**: If you later need to edit the options selected in building the portfolio, you can select from this screen.
- **Portfolio Members:** Use this option to share your portfolio with others or to transfer ownership of the portfolio you built, to another user(see JobAid – CTP-Portfolios – How So Share or Reassign a Portfolio).
- **Refresh Portfolio:** Use this option if new members are missing from your portfolio (for example, if you just created a new project and expect to see it in your portfolio but it's not there, use this option).
- **If you have access to Resource Portfolios, you may also see these:**
    - **Resource Management and Assignments**: This view will let managers view and manage how their team is assigned and utilized.
    - **Portfolio Timesheet**: Allows managers to quickly view and/or submit time for their portfolio of resources.
    - **Time Approval**: Provides access to screens where time can be approved or disapproved.

7. **Optional advanced options:**

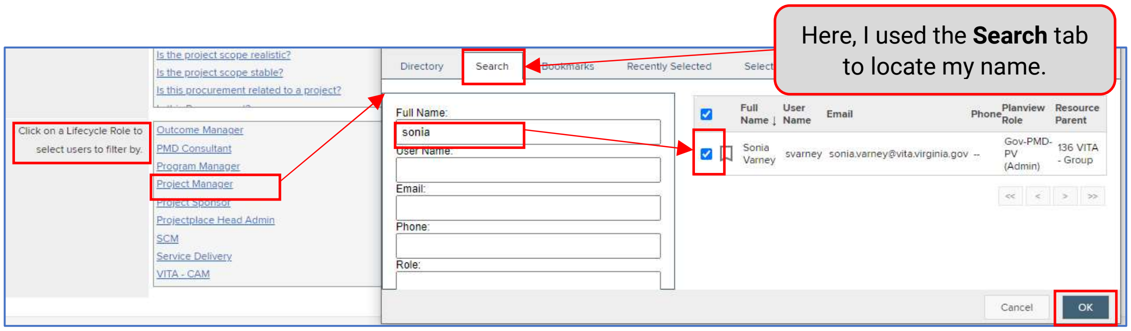
    - **Advanced Options** are not required to build a portfolio, however, if you want to further limit the projects that you will see in your portfolio, you can use options in this section.



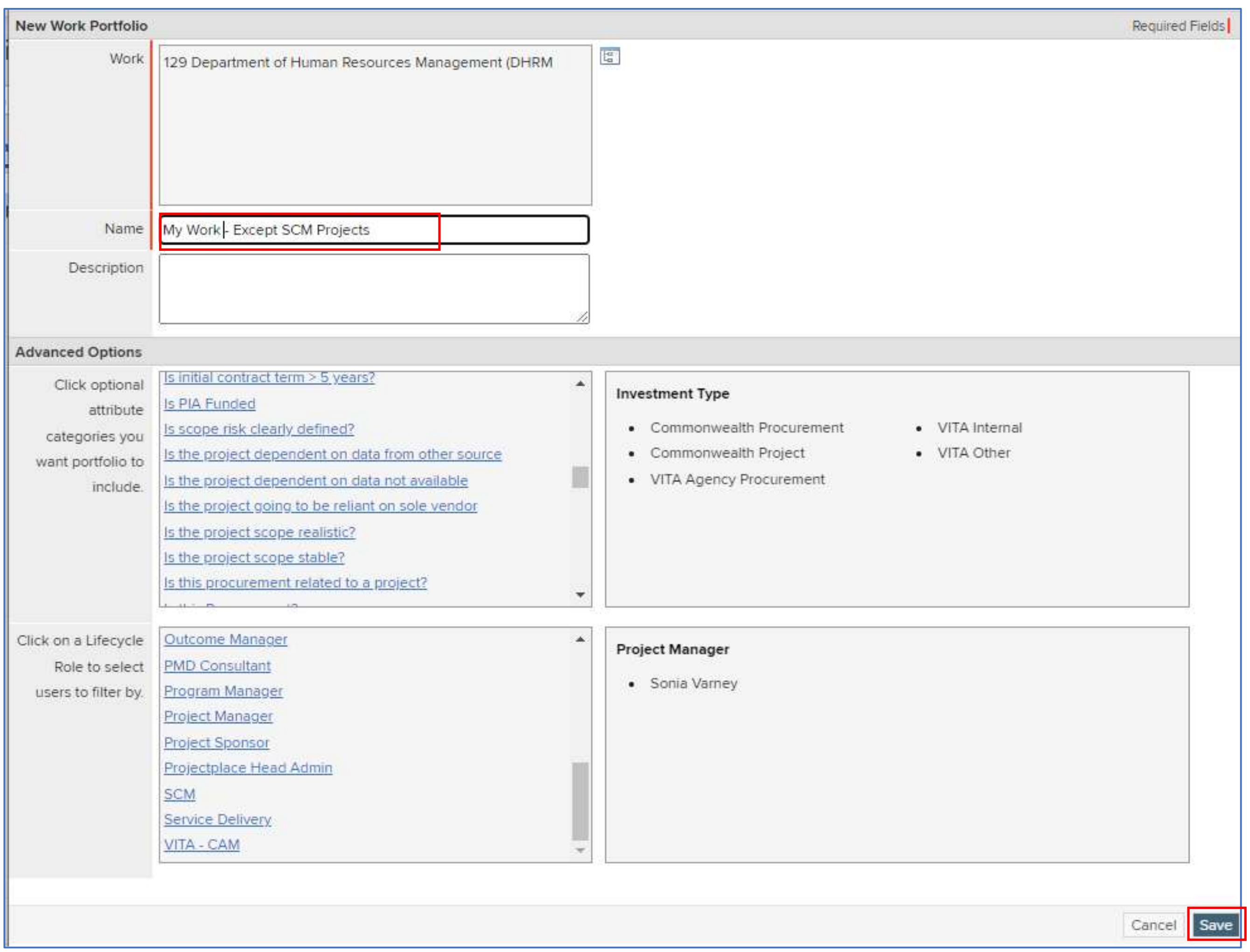
- **Optional attribute categories you want portfolio to include**
  - For example, if you wanted to see all projects, <u>except</u> VITA internal projects, you would scroll through the <u>first</u> list below **Advanced Options** (beside **Click optional attribute categories you want portfolio to include**) and find Investment Type. When you click on the link for the category, it will open another data picker where you can select the values you want to include in your portfolio.
  - When you are finished selecting, click **OK**.



- **Lifecycle Role to select users to filter by**
    - Basically the same if you want to limit what you see by different **Lifecycle Roles**. If you are a project manager, and you want to only see projects where *you* are the assigned project manager, you would find and select the Project Manager Lifecycle Role. This will bring up the data picker of all users that have the Project Manager Lifecycle Role. Find and select your name. Click **OK**.

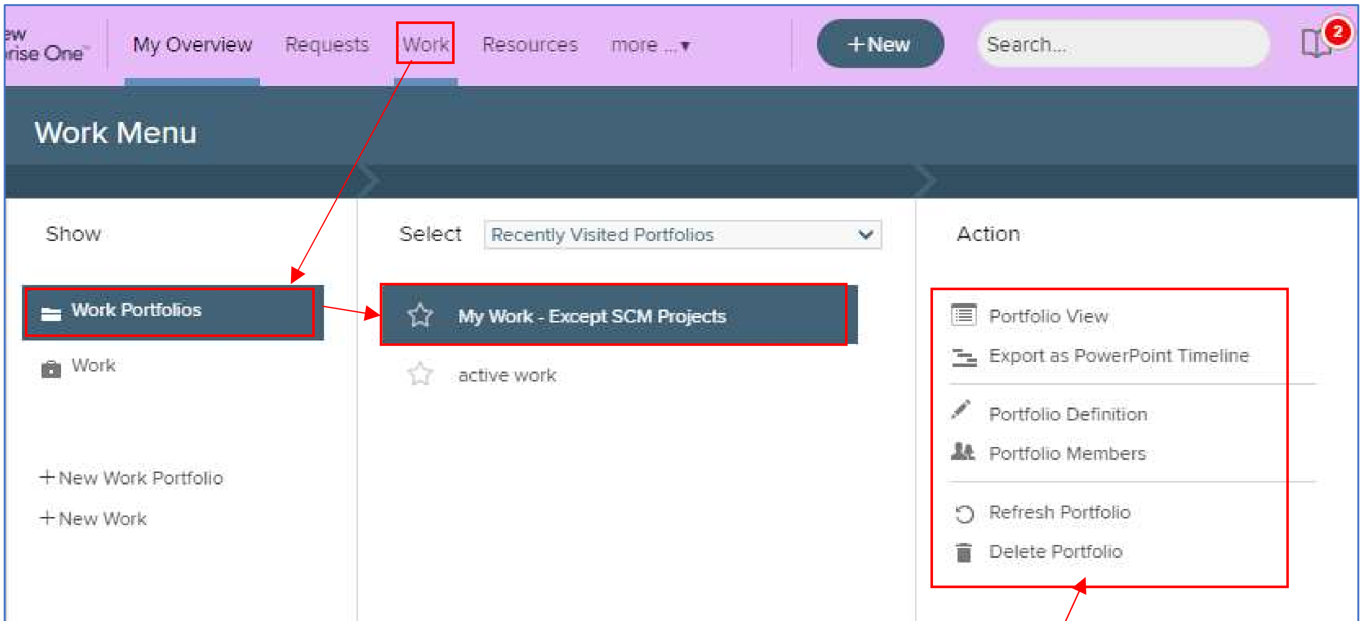


- If you use any of the **Advanced Options**, be sure to go back and reflect these in your **Portfolio Name** (for the one above, I might call it “My Work items - except SCM Projects”).



- When you are finished, click **Save**

8. Your **Work Portfolio** now shows the new portfolio name, viewed here from the **Work Menu**:



Notice that the same actions are available with either approach to finding the portfolio

And viewed here when using the **Search** box, then clicking on the ellipsis/ "kabob" (⁝)